

EZB-R Instructions

Part I General Information

- Line 1:** Enter legal name of the business
Line 2: Enter the mailing address of the business
Line 3: Enter the city, state and zip code of the business
Line 4: Enter the business telephone and fax number (including area code)
Line 5: Enter the address of the business location in the enterprise zone or inventory location
Line 6: Enter the Social Security number or the federal identification number of the business
Line 7: Check the appropriate organizational form of the business

- Line 8:** List the total number of employees at the zone location on the 15th day of each month, add the column, divide by 12 and enter the number on line 8

Example for line 8:

| Date | Employees |
|--------------|-----------|
| January 15 | 30 |
| February 15 | 30 |
| March 15 | 30 |
| April 15 | 30 |
| May 15 | 30 |
| June 15 | 45 |
| July 15 | 45 |
| August 15 | 45 |
| September 15 | 25 |
| October 15 | 25 |
| November 15 | 30 |
| December 15 | 30 |
| Year Total | 395 |

$$395 \div 12 = 32.9$$

Enter 32.9 on line 8

- Line 9:** List the total number of zone residents employed at the zone location on the 15th day of each month, divide the resulting figure by 12 and enter the number on line 9 (*see example in line 8 instructions*). **Every participating business must complete this line, even if your business does not utilize the hiring tax credits.**
- Line 10:** Enter the total of all wages and salaries paid at the zone location for the calendar year for which you are filing
- Line 11:** Enter the total wages and salaries paid to zone resident employees at the zone location for the calendar year for which you are filing
- Line 12:** Enter the total number of Enterprise Zone Qualified Employee Certificates (IT-40QEC) issued for the calendar year for which you are filing
- Line 13:** Enter the total number of new jobs created at the zone location during the calendar year for which you are filing
- Line 14:** Enter the total number of new jobs filled by zone residents during the calendar year for which you are filing

Part II Tax Savings Summary

If you are a new business or have no tax savings to report for the calendar year for which this form applies, please skip to Part III of this form.

- Line 15:** Enter the total inventory tax savings (2001 assessment payable 2002) at the zone location, from the EZ-1 form
- Line 16:** Enter the total gross income tax savings (not the exempted amount) claimed for the calendar year for which you are filing
- Line 17:** Enter the employment expense credit amount from Schedule EZ
- Line 18:** Enter the loan interest credit amount from Schedule LIC
- Line 19:** Add the amounts in Lines 15-18 and enter amount

Part III Registration Fee and Eligibility

- Line 20:** If the total on line 19, Part II exceeds \$1,000, multiply the amount by .01 and enter that amount on this line. If a zone business receives tax-saving incentives in excess of \$1,000 in any year, the business **MUST** pay an annual registration fee of one (1) percent of its tax savings to the STATE ENTERPRISE ZONE BOARD, or be denied credits and incentives and disqualified from further participation according to IC 4-4-6.1-2.5. **REMIT THE AMOUNT ON THIS LINE WITH THE ORIGINAL EZB-R TO:** State Enterprise Zone Board, One North Capitol, Suite 600, Indianapolis, IN 46204-2288. **You must still submit an EZB-R even if your business does not owe a registration fee!**
- Line 21:** Multiply the amount on line 19, Part II of this form by the local UEA rate and enter that amount on this line (please contact the local UEA to determine the rate). **REMIT THE AMOUNT ON THIS LINE TO THE LOCAL UEA WITH A COPY OF THIS EZB-R**
- Line 22:** New Capital Investment for the Calendar Year
A. Enter the total dollar amount spent in the calendar year for zone business renovation and improvements at the zone location
B. Enter the total dollar amount spent in the calendar year for new equipment at the zone location
C. Enter the total increase in inventory from previous year for reinvestment in inventory – attach a copy of the Inventory Valuation for Incentive Reinvestment Worksheet
- Line 23:** Enter the amount of zone resident employee wages for the calendar year that exceeds each taxpayer's base period qualified wages **AND/OR** the total dollar amount spent on employee training
- Line 24:** Add lines 20, 21, 22A, 22B, 22C, and 23 and enter that amount on this line

Signature Lines

Corporate/firm officer must sign this form and print name below written signature. **Failure to sign and print name and title may delay processing and may result in your form being returned to you.** If someone other than the corporate/firm officer prepared this form, their name, signature, address and phone number are required.